

Cupertino Rotary Endowment Foundation
Legacy Society Membership Form



Name(s) _____

Address _____

Primary Phone _____ Alternate Phone _____

Birth Date (optional) _____ Email _____

I have made an intended legacy gift to Cupertino Rotary Endowment Foundation as indicated below:

I have made a legacy gift to Cupertino Rotary Endowment Foundation as indicated below:

_____ Will (*Please designate: Cupertino Rotary Endowment Foundation*)

_____ Life Insurance Policy or Retirement Plan Beneficiary Designation

_____ Trust in which *Cupertino Rotary Endowment Foundation* is named as a beneficiary. Please indicate when the Foundation's interest will take effect. (Example: "Income to my spouse, then principal to Cupertino Rotary Endowment Foundation")

_____ Deferred Gift (i.e. Charitable Gift Annuity, Pooled Income Fund, Charitable Remainder Trust, Charitable Lead Trust, etc.) Please contact the current CREF President to discuss.

_____ Other (please describe) _____

Estimated amount of gift: \$ _____ or _____ % of estate, policy or account

Optional: Please enclose a copy of the pertinent section of your document mentioning Cupertino Rotary Endowment Foundation as a beneficiary. We will retain this in our confidential files as a record of your intention.

Congratulations. Your gift qualifies you for membership in our Legacy Society. We are honored to recognize you in our Legacy Society materials unless you indicate otherwise.

_____ Please list my/our names as follows: _____

_____ I/we wish to remain anonymous

Name	Signature	Date
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Name	Signature	Date
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